

Exploratory Research: Stadion Money Management

Update with details including but not limited to:

- Relevant client websites, socials, etc.
 - [Website](#)
 - [LinkedIn](#)
 - [Twitter](#)
 - [SEC Filings](#)
 - According to filings: manages ~\$2.5b
- Key technologies, industry terms, etc.
 - Financial advisory services + technologies for financial professionals
 - [StoryLine](#)
 - For employer-provided retirement plans
 - Personalized to individual employee needs
 - [TargetFit](#)
 - For individuals
 - Uses [target date funds](#): Assets become less risky as target date approaches
 - [Risk-based funds](#)
 - Uses [Collective Investment Trust \(CIT\) Series](#): Pools investments from multiple investors under a single trustee ([Benefit Trust Company](#)).
 - Unsure if retirement-focused or not
 - Multiple levels of risk depending on goals (maximum growth vs. capital preservation).
- Key client team member info (company website, LinkedIn, socials, etc.)
 - [Holly MacMillan LinkedIn](#)

About Stadion Money Management:

Stadion is an investment management firm that provides custom solutions to retirement plan advisors, plan sponsors and participants. Owned and based near Athens, GA.

- Investment strategies for retirement plans
- Streamlines personalization for those with said retirement plans, available as do-nothing default or opt-in choice
- Custom plan level glide paths and managed accounts with advisor input
- Support to advisor partners and clients (sponsor presentations, participant communications, US-based call center)
- Money management firm to help people plan for retirement
- Storyline: Advisors/professional help to manage your account
 - Gathers info about you, conducts analysis, and professionally manages accounts

Mission: Make investing easier to understand and less stressful for investors

- Everything explained simply and in plain english, tools to personalize accounts and how you feel about risks, US-based services you can call or email to get answers you need

Competitors:

- Big guns: Fidelity, Charles Schwab, Vanguard, Betterment, Empower, etc. or various banks (Morgan Stanley, Wells Fargo, etc)
- Competitors in category: Edelman, Morningstar, Empower, Fidelity, etc
- More direct competition in Athens: Elwood & Goetz, Moores Wealth Management, Arch Financial Planning

What direct competitors have on their websites:

- Bigger client board (shows brands/companies they work with, credibility)
- Shows pictures of real people (more personalized, shows who works with them – show target market, professional investors)
- Fee structure is more transparent
- How to get started
- Impact page
- Blog / more specific section for company newsletters
- More under “Why Us” page
- Under “services” tab, more tabs underneath that show a wide array of services, builds credibility

Holly MacMillan

- SVP, Chief Marketing Officer
- Went to UGA (Terry), AMA, Marketing Degree
- Experience spans marketing, project manager, product manager, financial consultant
- Always worked in finance/fintech, first experience at Merrill Lynch

Adriianne Beacham

- High presence on Terry, good connection to UGA
- US Finance Director

Stadion LinkedIn

- 2k followers
- Engagement is low (7 likes on most recent informational post)
- Lots of infographics, less events
- Not many/none customer testimonials
- ~3 posts per month
- No IG Presence

Stadion Video

- Very informational, very clear, but lacks real-person presence/image
- No “Why Us” statement over other companies
- Talks about their services and what they are, but not as much how to get started

Stadion Brand Presence

- Lacks social presence, only on LinkedIn
- ~100-200 employees, small company
- Needs bigger voices advocating
- Lack of credibility on website, which is their main presence
- No company spotlights on LinkedIn: See Fidelity below

Company spotlights



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[Our Location](#)



A Financial Services Company that Puts People & Relationships First

At Fidelity, our customers are at the heart of everything we do. As a privately held company with a rich 75-year history, our mission has remained the same since our founding: to strengthen the financial well-being of our clients.

We also apply the same level of care to our employees. At Fidelity, you can take advantage of flexible benefits that support you through every stage of your career, empowering you to thrive at work and at home.

[Our Benefits](#)
[View Our Open Roles](#)

- Little brand presence on review sites/newsletters/news/articles
- Nominated for Best Places To Work by Pensions & Investments, but not advertised on site or LinkedIn

Stadion Competitive Advantage

- White-label flexibility sets them apart from one-size-fits-all money management providers, more personal - play on this with brand presence
- B2B2C structure, not walk-in wealth planning
- Integrated with recordkeepers and offers white-label programs (i.e. StoryLine), a single plan can enroll lots of participants quickly
- Deeper personalization at the plan level, not just client
- Advisors and personalization
- TargetFit is built for qualified retirement plans, not the general public, institutional pricing
- Best for upgrading a company's 401k experience

Stadion lacks at...

- Face-to-face wealth planning over other local firms

- Competitors? Local and national? What do they do differently?
- Website auditing tools
 - SEO auditing
 - [Google Search Console](#)
 - Free(?)
 - Requires DNS verification
 - [Screaming Frog](#)
 - Free & paid
 - Performance auditing
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- Understanding financial terminology: things to know before the meeting

